Washington State Health Care Authority Medicaid

January 2013

Create a Template then submit a Template Claim

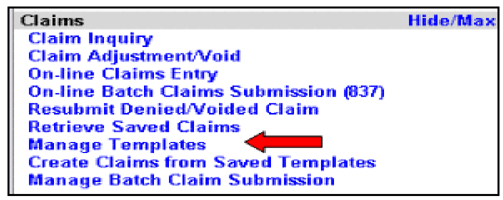
One of the features of ProviderOne allows a provider to create and save a direct data entry (DDE) claim template(s). Templates are pre-designed E-claims that can be customized for a particular service or item supplied monthly to a client, or billing for a special service code, or create template batches at a Nursing Home. Templates then can:

- Be used as a starting point for claim entry with standard information already filled in.
- Be used over and over so that each claim does not have to start from scratch.
- There is no limit to the number of templates that can be created.
    - Submit a single claim from a saved template.
    - Submit batches of claims from saved templates. **

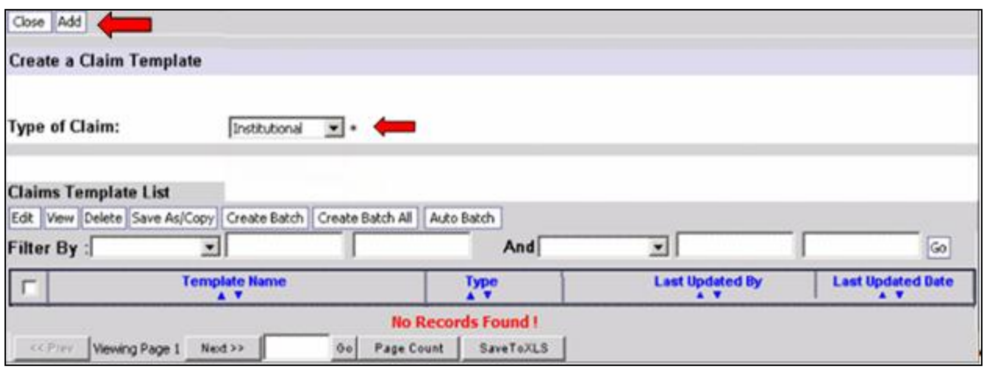
**See the webinar presentation Submit Nursing Home Claims using Templates

Create a Template

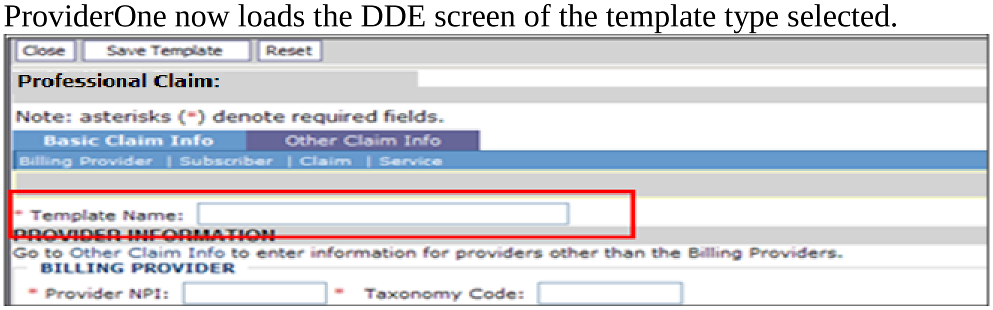
Log into ProviderOne using the Claims Submitter or Super User profile and at the provider portal click on "**Manage Templates**."



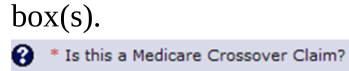
At the Create Claim Template screen, pick the template type then click on the "**Add**" button.



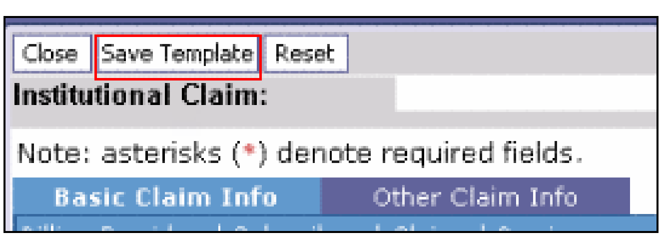
ProviderOne now loads the DDE screen of the template type selected.



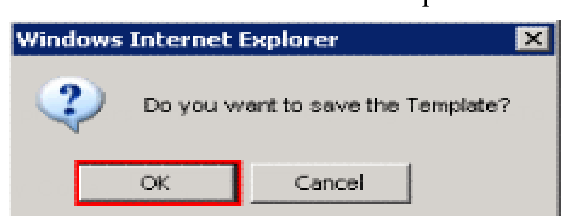
The minimum data required to save a template is the **Template Name** and to answer all questions listed in the grey box(s).



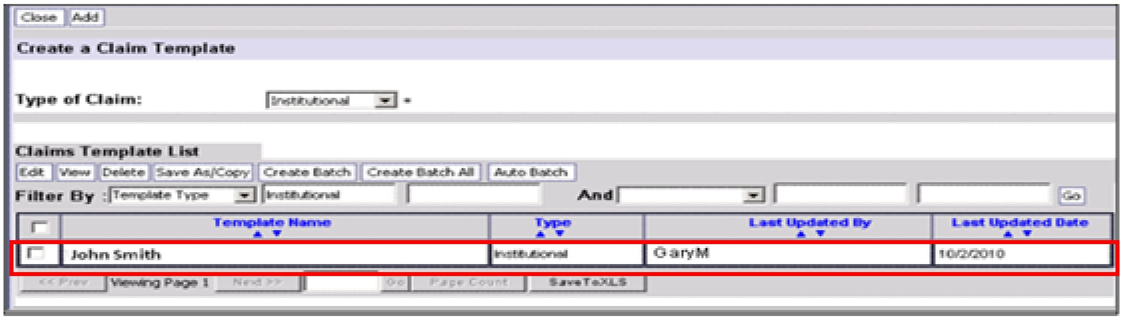
A provider can add as much information as they need to a template to save. Once the template is completed click on the "**Save Template**" button.



ProviderOne then asks the question:



After clicking the OK button, ProviderOne returns to the Claim Template screen adding the template to the list.

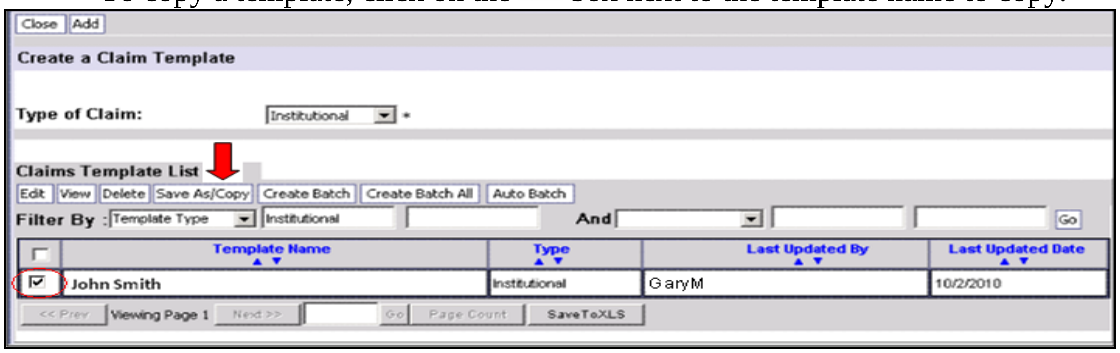


Add as many templates as needed

- Create new ones using the above method or
- Copy a saved template then edit it

Copy a Template

- To copy a template, click on the box next to the template name to copy.

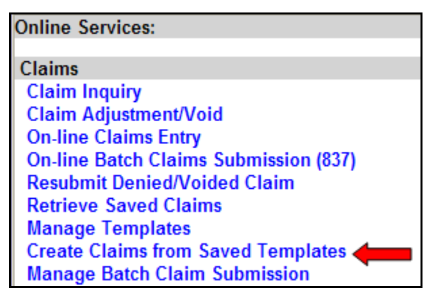


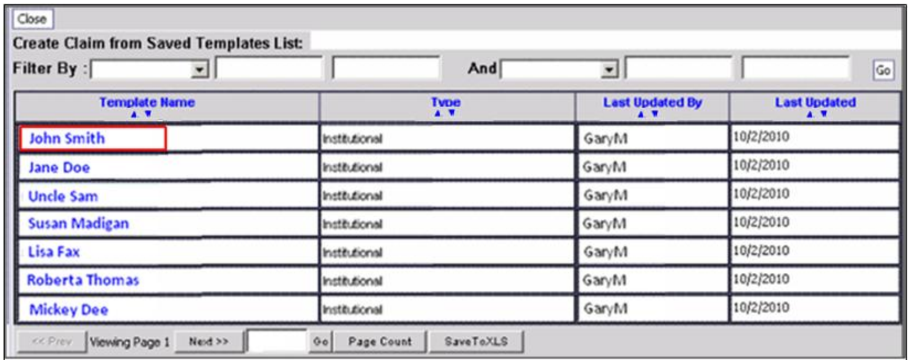
- Then click on the **Save As/Copy** button
- The system now displays the DDE screen with the template information except the template name. Name this template and change any data as needed then save the template. Build as many templates as required using this method.

Use the Edit feature to make changes to any template. Delete templates no longer needed to keep the template list manageable.

Submit a Claim using a Template

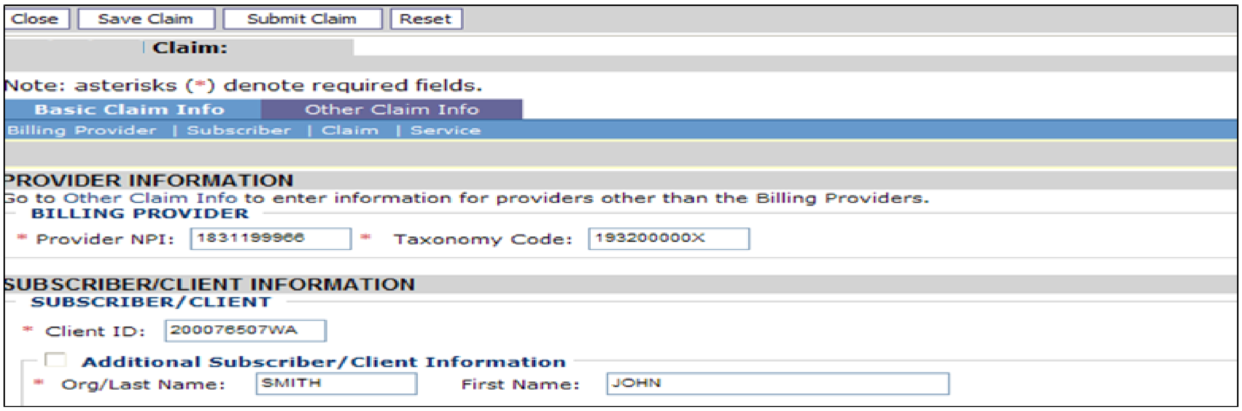
Log into ProviderOne using the Claims Submitter or Super User profile and at the provider portal click on "**Create Claims from Saved Templates.**"





Click on the template name to create a claim

ProviderOne loads the template data in the DDE claim screen.

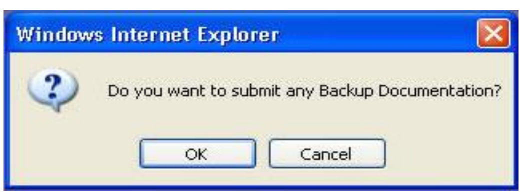


Finish filling in all the claim data.

- Once completed the claim can be saved or
- Submit the claim to ProviderOne

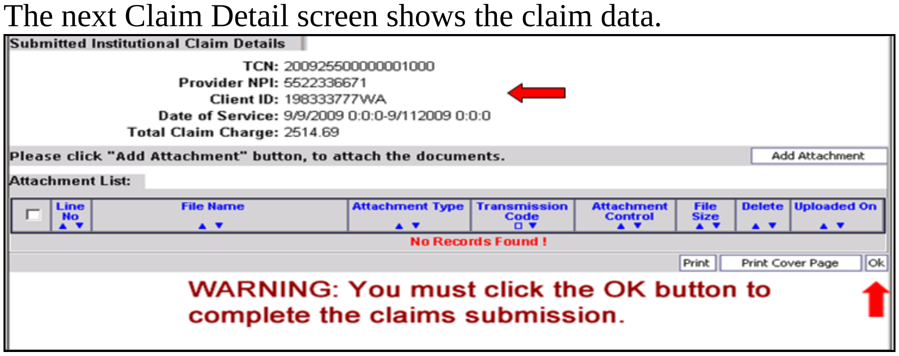
To submit the claim:

- Click on the Submit Claim button
- ProviderOne should then display the BU prompt



- Click OK to submit back up or
- Click cancel for no BU (we are not sending BU)

The next Claim Detail screen shows the claim data.



It is <u>required</u> to click the **OK** button to send the claim!!

References

See the Provider Training web site for links to recorded Webinars, E-Learning, and Manuals
http://www.dshs.wa.gov/provider/training.shtml

Questions

What are templates?

Templates are pre-designed electronic claims that a provider can customize by entering standard information for a particular service, client, or group of clients. The template can then be used as a starting point for claim entry with the standard information already filled in. There is no limit to the number of templates providers can create.

Why would I use templates?

If you regularly bill similar services for similar clients, it may benefit you to use templates so that some of the standard information you would have to enter on every claim is prefilled in for you.

How do I access the template/submit batch features?

In the provider portal, the features are accessed through these menus:

- **Manage Templates** – Use this option to create, edit, and manage templates.
- **Create Claims from Saved Templates** – Use this option to start a new claim from a saved template.
- **Manage Batch Claim Submission** – Use this option to submit a batch of claims created from saved templates. Using a combination of date ranges and checkboxes, the saved templates selected by a provider will be batched together and submitted as claims for processing in ProviderOne.
- **<u>Institutional</u> batch claims process -** Makes it easier to submit batches of Institutional claim types, based on <u>admit</u> and <u>discharge</u> dates. This feature is designed especially for Nursing Homes but may be useful for other institutional providers. **NOTE** – This enhancement will only be available for Institutional claims. It will not be possible to use admit/discharge dates on Professional and Dental claims

How do I use the template/submit batch features?

Providers are encouraged to begin using the template and batch features in a gradual manner, beginning with just a few claims at first while learning the process. For instructions on how to use the features, we suggest that you minimally review the E-Learning modules for your claim type on:

- Manage Claim Templates (*about 18 minutes*)
- Create a Claim for a Saved Claim Template (*about 4 minutes*)
- Managing Batch Claim Submission (*about 13 minutes*)

Who can use templates?

Any provider billing through the direct entry screens in ProviderOne can use the template features.

What if I have questions?

Providers with questions about templates should first review the template training materials, and frequently asked questions on the Medicaid Provider website http://hrsa.dshs.wa.gov/provider/training.shtml If those materials do not suffice, the providers should submit a question through https://fortress.wa.gov/dshs/p1contactus/. In the “Select Topic” drop-down on the form, please select Create Template/Batch.